



*PTC Subcontractor Account Creation and
Upgrade Guide*

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Introduction

Audience:

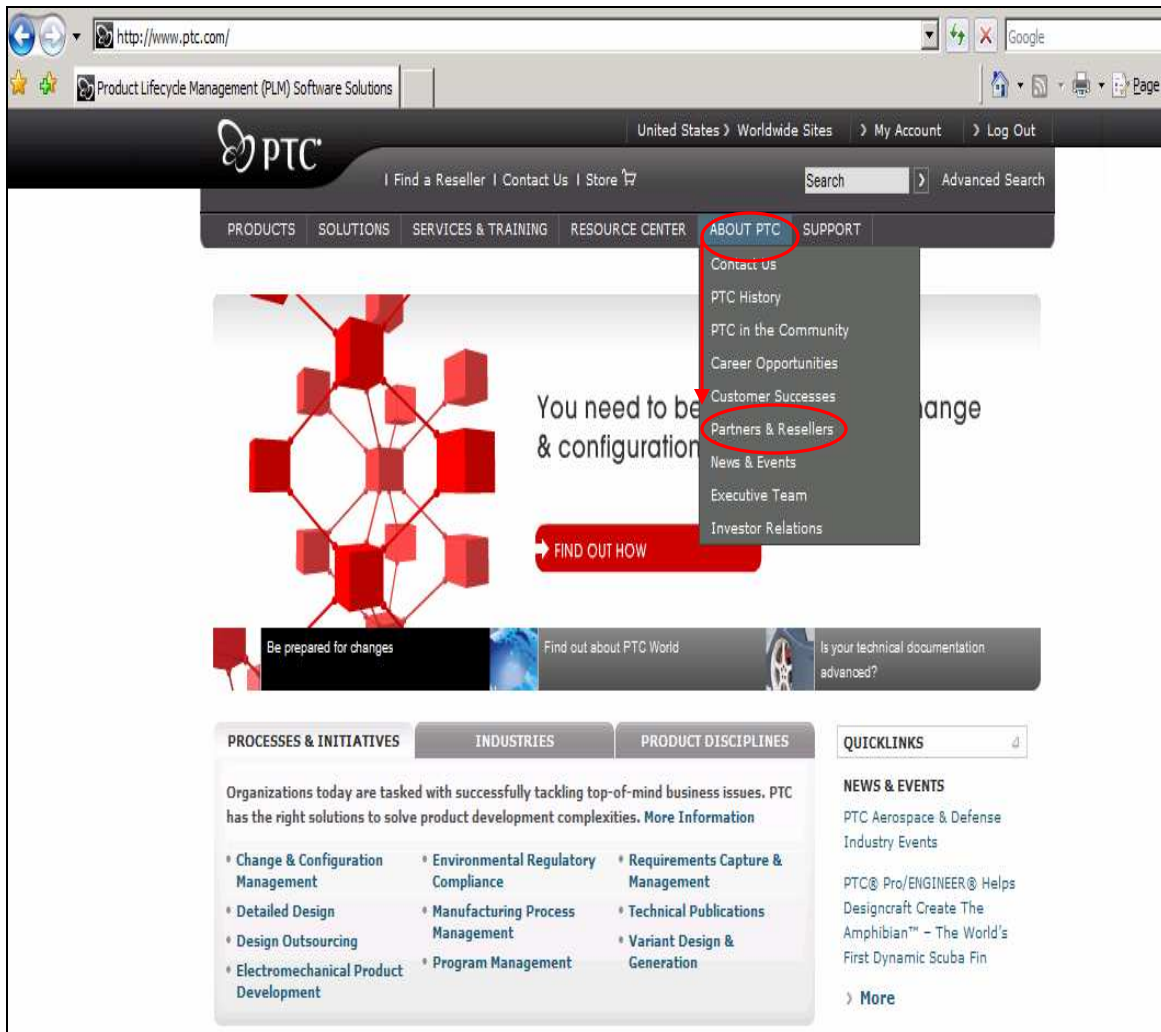
This guide is intended for PTC subcontractors.

Overview:

This user guide details the steps required for PTC subcontractors to create and upgrade a PTC partner account. Troubleshooting steps that subcontractors can take to resolve issues accessing the Partner Portal are outlined, as well. You will need to upgrade your account if you are working on projects that require you to report your time.

Creating a PTC Partner Account

1. Access www.ptc.com to begin the account creation process.
 - a. Note: PTC.com supports Internet Explorer 6/7 and Mozilla Firefox 2.X. Please disable all pop-up blockers.
2. Hover over the **ABOUT PTC** tab, then click **Partners & Resellers**.



Creating a PTC Partner Account (cont.)

3. Click the **Visit the Partner & Reseller Portal** link.

PTC

United States > Worldwide Sites > My Account > Log Out

I Find a Reseller | Contact Us | Store

Search Advanced Search

PRODUCTS SOLUTIONS SERVICES & TRAINING RESOURCE CENTER ABOUT PTC SUPPORT

Home > About PTC > Partners & Resellers

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Partners & Resellers

PTC Partnerships Give You the Advantage

Access the comprehensive suite of capabilities and processes PTC has gained through partnerships with the world's leading resellers and software, hardware, and services companies.

Visit the Partner & Reseller Portal

PTC PARTNERS PTC RESELLERS

PTC Partner Advantage™

PTC's Partner Advantage program includes a wide range of software, platform, consulting, content, and publication partners. Through our Partner Catalog, you can find the partner, product or service needed to support your business initiatives.

[Learn more...](#)

4. Click the **Create a basic account now** link.

Address http://www.ptc.com/partners/membercenter.htm

Home > About PTC > Partners > Partner Portals

Print Email this page

One

NOTE: Disregard this warning. IE7 and Windows Vista are compatible.

Partner Portals

Securely Access PTC Information

ATTENTION: Microsoft will be releasing IE7 and Windows Vista shortly. PTC's partner portal does NOT currently support these systems. Please do not upgrade to IE7 or Windows Vista until support can be added.

PTC provides a secure Web portal so partners can access information relevant to them. The process listed below, for account creation and activation, is for all PTC partners. If you already have your account, you can log in to the portal now.

- Create a basic account**
 - You should have: A company domain e-mail address (this will be your username), your first and last name, and a password
 - If you have a basic account and have forgotten your password, you may [have your password reset](#)
 - If you have a basic account and know your password you may skip to step two**
 - Create a basic account now**
- Upgrade your account for customer support and/or partner access**
 - You will need: A basic account (created in step one), a partner contract number, a customer number, and either a service contract number (SCN) or a sales order number (SON) or a site number
 - Only certain partner types have this information. If you are a Channel Partner or Enterprise Consulting Partner and do not have the above listed information, please contact partnerinfo@ptc.com to request this information
 - Other partner types (Training partners for example) must contact partnerinfo@ptc.com to specifically request this partner access
 - [Upgrade your account now](#)

Creating a PTC Partner Account (cont.)

5. Enter at least the required information in the text boxes. A * denotes a required field.
 - a. Please use a company email address (i.e., do not use hotmail, gmail, yahoo, etc.).

You will receive a confirmation email from PTC shortly after clicking the **Create Account** button.

- Note: Please add the *ptc.com* domain to your email application's Safe Senders List to ensure receipt of PTC correspondence. See your email application's user manual for specific instructions.

Address  http://www.ptc.com/appserver/common/account/basic.jsp

Home > PTC.com Accounts > New Account Print Email this page

Webcast Replay Available
 Overcome the Top 5 Challenges of Electromechanical Product Development
[VIEW WEBCAST >](#)

New Account

Creating a PTC.com account is simple: Fill out the form below and your new account will be available immediately. Once you've created your account, you'll be able set your preferences and upgrade your account. An upgraded account allows active Maintenance Support customers access to all of the online Technical Support tools and product "Tips & Techniques" sessions.

NOTE:

- Your e-mail address will be your new ptc.com username.
- All fields marked with a * are required.
- An upgrade will be necessary for access to areas specific to customers and partners.

All fields marked with a * are required.

Personal Information

* First Name:

* Last Name:

* E-mail:

* Confirm E-mail:

Title:

Telephone:

Fax:

Preferred Language: English 

I would like **Password must be at least 6 characters.**
 (includes: **Only a-z, A-Z, 0-9, and _ are acceptable characters.**

Security Information

* Password:

* Confirm Password:

* Password Hint Question:

* Password Hint Answer:

Password Hint Question: A private question that only you should know the answer to. This question will be used when resetting your password.

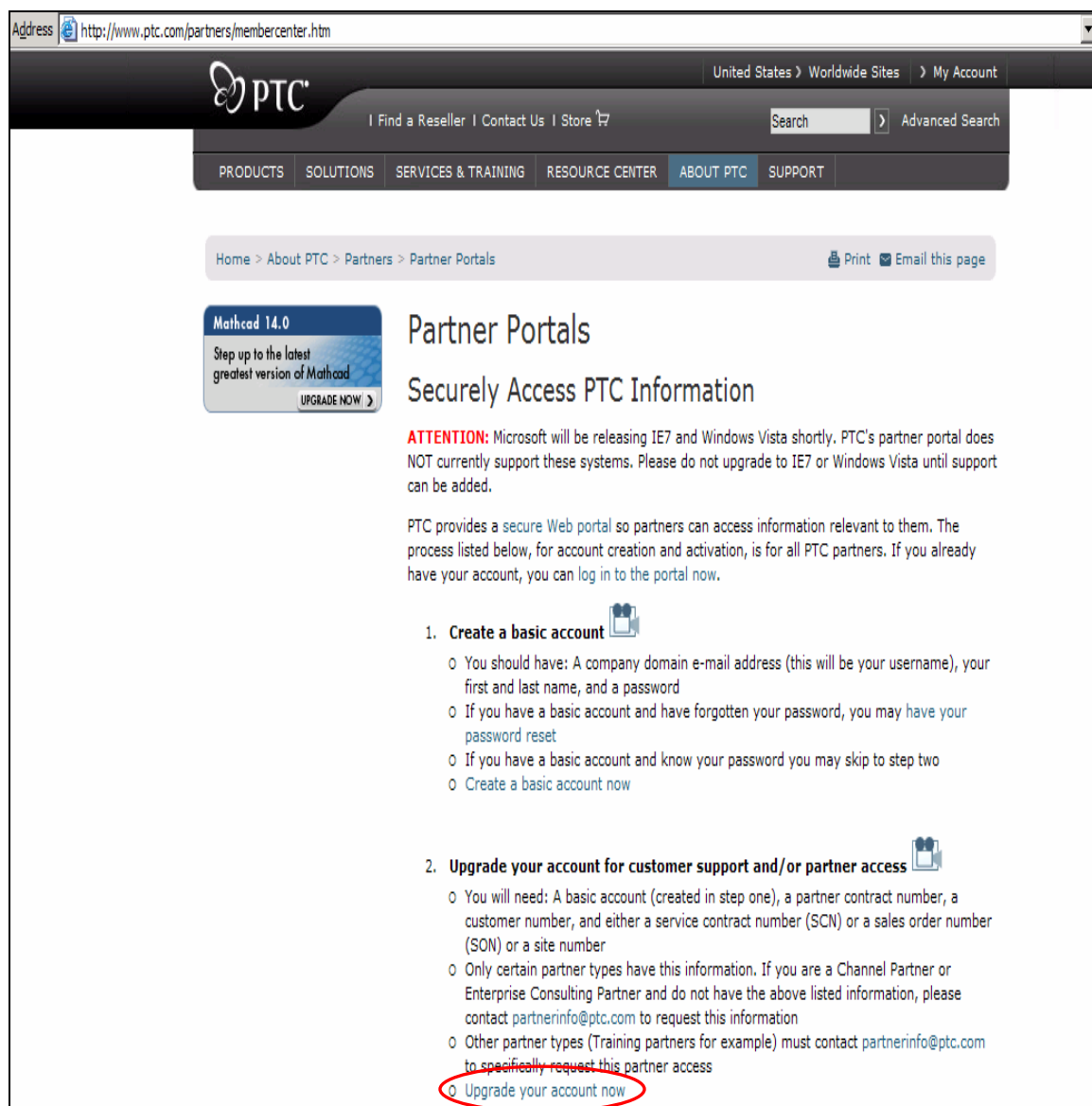
Password Hint Answer: The answer to your Password Hint Question. This answer will be required when resetting your password.

Upgrading a Basic PTC Partner Account

If you are a **PTC Customer, Consulting Partner or Reseller (VAR)**, you can upgrade your account to gain access to customer and partner-only content. Additionally, if you have an active maintenance agreement with PTC you can get access to customer support, including the knowledge base and help desk.

To upgrade your account:

1. Go to www.ptc.com.
2. Hover over the **ABOUT PTC** tab, then click **Partners & Resellers**.
3. Click the **Visit the Partner & Reseller Portal** link.
4. Click the **Upgrade your account now** link. *See screenshot below.*



The screenshot shows the PTC website's Partner Portals section. The address bar indicates the URL is <http://www.ptc.com/partners/membercenter.htm>. The navigation bar includes links for United States, Worldwide Sites, My Account, Find a Reseller, Contact Us, and Store. The main navigation menu has tabs for PRODUCTS, SOLUTIONS, SERVICES & TRAINING, RESOURCE CENTER, ABOUT PTC, and SUPPORT. The breadcrumb trail shows the path: Home > About PTC > Partners > Partner Portals. A sidebar on the left promotes Mathcad 14.0 with an 'UPGRADE NOW!' button. The main content area is titled 'Partner Portals' and 'Securely Access PTC Information'. It includes an attention warning about IE7 and Windows Vista support. Below this, it provides instructions for creating a basic account and upgrading for customer support and/or partner access. The 'Upgrade your account now' link is circled in red.

Address <http://www.ptc.com/partners/membercenter.htm>

United States > Worldwide Sites > My Account

Find a Reseller | Contact Us | Store

Search Advanced Search

PRODUCTS SOLUTIONS SERVICES & TRAINING RESOURCE CENTER ABOUT PTC SUPPORT

Home > About PTC > Partners > Partner Portals Print Email this page

Mathcad 14.0
Step up to the latest greatest version of Mathcad
[UPGRADE NOW!](#)

Partner Portals

Securely Access PTC Information

ATTENTION: Microsoft will be releasing IE7 and Windows Vista shortly. PTC's partner portal does NOT currently support these systems. Please do not upgrade to IE7 or Windows Vista until support can be added.

PTC provides a [secure Web portal](#) so partners can access information relevant to them. The process listed below, for account creation and activation, is for all PTC partners. If you already have your account, you can [log in to the portal now](#).

1. **Create a basic account**
 - You should have: A company domain e-mail address (this will be your username), your first and last name, and a password
 - If you have a basic account and have forgotten your password, you may [have your password reset](#)
 - If you have a basic account and know your password you may skip to step two
 - [Create a basic account now](#)
2. **Upgrade your account for customer support and/or partner access**
 - You will need: A basic account (created in step one), a partner contract number, a customer number, and either a service contract number (SCN) or a sales order number (SON) or a site number
 - Only certain partner types have this information. If you are a Channel Partner or Enterprise Consulting Partner and do not have the above listed information, please contact partnerinfo@ptc.com to request this information
 - Other partner types (Training partners for example) must contact partnerinfo@ptc.com to [specifically request this partner access](#)
 - [Upgrade your account now](#)

Upgrading a Basic PTC Partner Account (cont.)

Note: the screenshot for step 5 is on the next page.

5. To complete the upgrade process, you will need at least i, ii, and one item from iii; iv is optional:
 - i. **Basic Account** (see the section [End User: Creating a PTC Partner Account](#))
 - ii. **Customer Number**
 - o A customer number can be found directly under the company name and address in the first section of the license pack, or on the shipment confirmation email, or the shipment confirmation email.
 - iii. One of the following:
 - o **Service Contract Number (SCN)**
 - A service contract number is located in the summary table of the license file, and is referenced as Contract. The service contract number should be prefixed with “1-9A” or “1-9H” (1-9 being a range of possible numbers). The service contract number is your maintenance entitlement ID.
 - o **Sales Order Number (SON)**
 - The sales order number can be located on the shipment confirmation email or the shipment confirmation letter. The shipment confirmation email is sent to the purchasing agent once the order is booked, and the shipment confirmation letter is sent with the shipment of software.
 - o **Site Number**
 - The site number is used to identify your company’s location. A single company can have multiple sites. Your site number will represent your physical address. Site numbers can be located on your License Pack or Packing Slip next to the address in parentheses.
 - iv. **Contract Number** [Note: Only necessary for *Consulting Partners* or *Resellers (VARs)*]
 - o If you’re an employee of a PTC partner and don’t know your contract number, please contact your PTC partner manager (*Online Supervisor*).
- Only certain partner types have this information. If you are a *Channel Partner* or *Consulting Partner* and do not have the above listed information, please contact partnerinfo@ptc.com to request this information.
- You can also contact your company’s *Online Supervisor(s)*. Almost all companies that have employees who subcontract for PTC have an Online Supervisor. Your Online Supervisor provides partner account support to PTC subcontractors within their own company. If your company does not have one, consider volunteering.

Upgrading a Basic PTC Partner Account (cont.)

An Online Supervisor can provide the above information needed for the upgrade process, as well. Please contact partnerinfo@ptc.com if you do not know the name of your company's Online Supervisor. Note: if you have already upgraded your account, you can view a list of your Online Supervisor(s) under the **Customer Support** tab.

- Other partner types (e.g., *Training Partners*) must contact partnerinfo@ptc.com to specifically request this partner access.

Screenshot 1: Account Upgrade Process, step 5 (above)

Home Print Email this page

FREE ASSESSMENT **NEW**
Pro/ENGINEER Users
Test Your Sheetmetal Knowledge
ASSESS YOUR SKILLS

Upgrade Your PTC.com Account

If you are a PTC customer or an Enterprise Consulting Partner or VAR, you can upgrade your account to gain access to customer and partner-only content. Additionally, if you have an active maintenance agreement with PTC you can get access to customer support, including the knowledge base and help desk.
Upgrading an account is easy, just fill in the information below and you'll be on your way.

Important information: It is **necessary** that your e-mail address is correct. Without the correct e-mail address, you will be unable to activate your PTC.com account upgrades.

The e-mail address we have on record for you is: **ptc.subk@**

If this e-mail address is incorrect, please correct it before continuing.

- [PTC.com Account Management](#)

All fields marked with a * are required.

Customer Number
You must enter your Customer number to upgrade your PTC.com account.

* **Customer Number:**

Customer Information
Please supply one of the following pieces of information for verification.

Service Contract Number (SCN):

- or -

Sales Order Number (SON):

- or -

Site Number:

Partner Information
If you are an Enterprise Consulting Partner or VAR, enter your contract number or version to receive access to PTC Partner areas. Contact your PTC partner manager

Contract Number:

< Cancel Reset Upgrade >

Note: ensure that your email address is correct before proceeding.

Click this link to change your email address if it is incorrect.

Note: if you are a Consulting Partner or Reseller (VAR) enter your contract # or version.

Important: If you are not a *Consulting Partner* or *Reseller (VAR)*, and hence did not enter a **Contract Number** above, you will need to email a request to the PTC staffer who asked that you set up this account, requesting that your account entitlement be completed.

Upgrading a Basic Partner Account (cont.)

Have questions or need assistance upgrading a PTC.com account?

- Email partnerinfo@ptc.com with the subject line: *Account Upgrade Help*.
 - Include your company name and full contact information (including your basic account username and the type of partner you are). A representative from our partner program will contact you within the next 2 business days.

Logging in to the Partner Portal

After successful completion of all the steps in the [End User: Upgrading a Basic Partner Account](#) section, you are ready to log in to the partner portal.

How to log in to the partner portal:

1. Go to www.ptc.com.
 - a. Note: PTC.com supports Internet Explorer 6/7 and Mozilla Firefox 2.X.
Please disable all pop-up blockers.
2. Hover over the **ABOUT PTC** tab, then click **Partners**.
3. Click the **Partner Portals** link on the left side of the page.
4. Navigate to step 5 on the page. Click the **Log in to the portal now** link.
5. Enter your *username* (email address that you used when creating your account) and *password*. (Your password is case-sensitive.)
 - a. Note: ensure that **Standard** is selected from the **Server** drop down box.
6. Click the **Sign In** button.

Address: https://secure.ptc.com/dana-na/auth/url_default/welcome.cgi

**NOTE: Disable all pop-up blockers/stoppers.
Windows XP with Service Pack 2 includes a built-in pop-up blocker.**

Please sign in to begin your secure session.

Username:

Password:

Server:

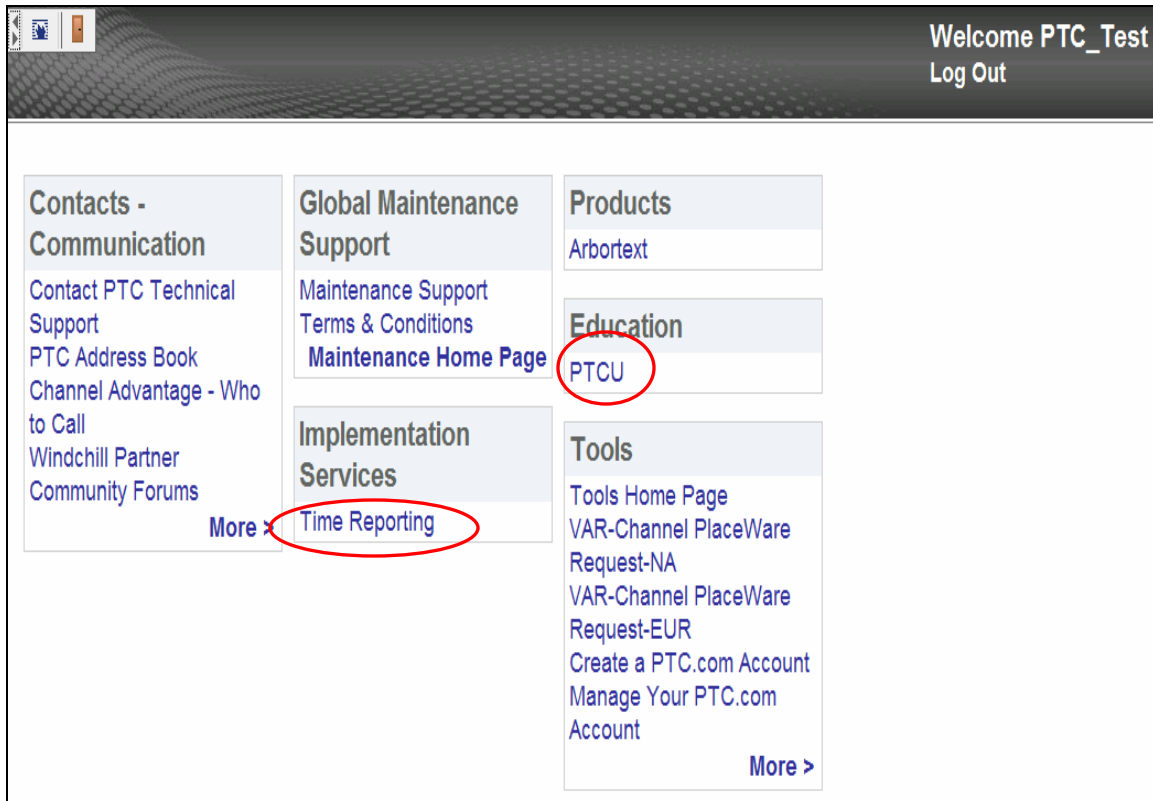
For SecurID users please select SecurID and log in using your PIN number followed by the token display. The format for this is <PIN> + PASSCODE.

All other users must select \"Standard\" from the drop down box.

IMPORTANT!! If you are running any kind of pop-up stopper or XP SP2 your portal login may not function properly. Please Click the help button for more information.

Logging in to the Partner Portal (cont.)

If you successfully logged in you will be presented with the Partner Portal homepage. Note that the layout and portlets for your account may be different depending on your access rights. All subcontractors can access Clarity to submit a timesheet by clicking the **Time Reporting** link under the **Implementation Services** portlet or take classes by clicking the **PTCU** link under the **Education** portlet.



If you would like to learn more about **Time Reporting** there is a tutorial in PTCU titled *PSA Clarity Project Management Training & Migration Workshop*.

Partner Portal FAQ

The FAQ section of the Partner Portal answers several frequently asked questions regarding portal access and services.

To access the Partner Portal FAQ:

6. Go to www.ptc.com.
7. Hover over the **ABOUT PTC** tab, then click **Partners**.
8. Click the **Partner Portals** link on the left side of the page.

Address <http://www.ptc.com/partners/membercenter.htm>

3. FAQ

- How do I get portal access?
Portal access for all types of partners is immediately granted upon completion of the partner portion of step two.
- How do I get access to Channel Advantage Axis?
This account will be automatically generated within 24 hours of the partner portion of step two being completed.
- How do I get access to PTC University?
Once step two is completed for both partner privileges and customer support privileges PTC University access will be granted, in approximately 24 hours.
- How do I get Ariba, so I may log my time?
Ariba access is generated on a per need basis. If you know your PTC partner manager e-mail them now. If not please use the contact link below.
- How do I get Research and Development access?
R&D access is generated on a per need basis. If you know your PTC partner manager e-mail them now. If not please use the contact link below.

NOTE: Clarity is now used for time reporting, not Ariba.

4. Contact

- If you have any questions please contact partnerinfo@ptc.com. Include your company name and full contact information (including your basic account username and the type of partner you are). A representative from our partner program will contact you within the next 2 business days.

5. Log in to the portal now

6. Still having problems?

- Check out the portal issues [help page](#).

Partner Portals Help Page

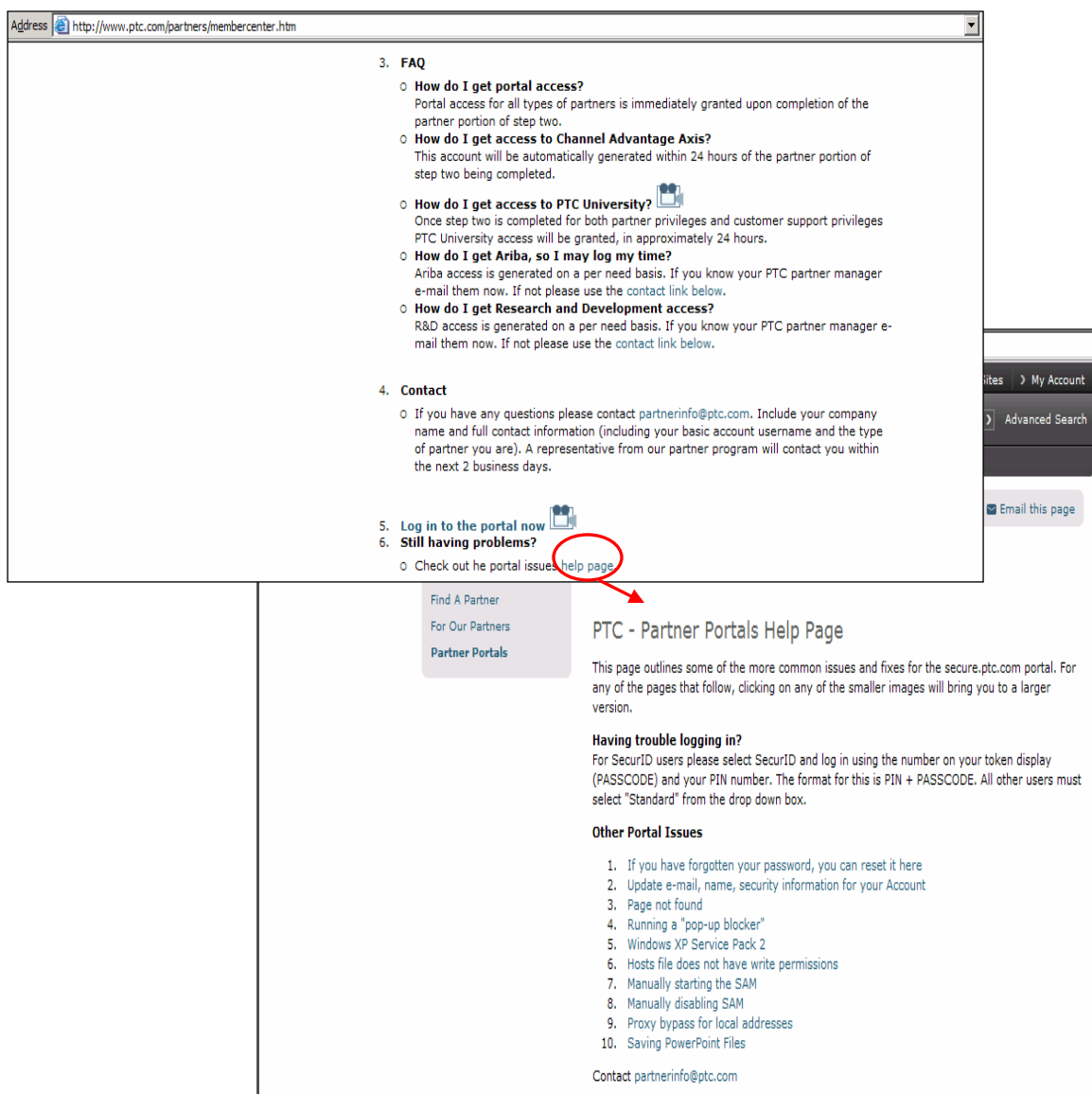
Please check the Partner Portals Help Page to see if your specific issue regarding access to the secure.ptc.com portal is discussed before contacting PTC technical support.

To access the Partner Portals Help Page:

1. Go to www.ptc.com.
2. Hover over the **ABOUT PTC** tab, then click **Partners**.
3. Click the **Partner Portals** link on the left side of the page.
4. Click the **help page** link at the bottom of the page. *See screenshot below.*

Need more help?

- [See the Diagnostics section of this guide.](#)



Address <http://www.ptc.com/partners/membercenter.htm>

3. **FAQ**

- o **How do I get portal access?**
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- o **How do I get access to PTC University?**
Once step two is completed for both partner privileges and customer support privileges PTC University access will be granted, in approximately 24 hours.
- o **How do I get Ariba, so I may log my time?**
Ariba access is generated on a per need basis. If you know your PTC partner manager e-mail them now. If not please use the [contact link](#) below.
- o **How do I get Research and Development access?**
R&D access is generated on a per need basis. If you know your PTC partner manager e-mail them now. If not please use the [contact link](#) below.

4. **Contact**

- o If you have any questions please contact partnerinfo@ptc.com. Include your company name and full contact information (including your basic account username and the type of partner you are). A representative from our partner program will contact you within the next 2 business days.

5. **Log in to the portal now**

6. **Still having problems?**

- o Check out the portal issues [help page](#)

Find A Partner
For Our Partners
Partner Portals

PTC - Partner Portals Help Page

This page outlines some of the more common issues and fixes for the secure.ptc.com portal. For any of the pages that follow, clicking on any of the smaller images will bring you to a larger version.

Having trouble logging in?

For SecurID users please select SecurID and log in using the number on your token display (PASSCODE) and your PIN number. The format for this is PIN + PASSCODE. All other users must select "Standard" from the drop down box.

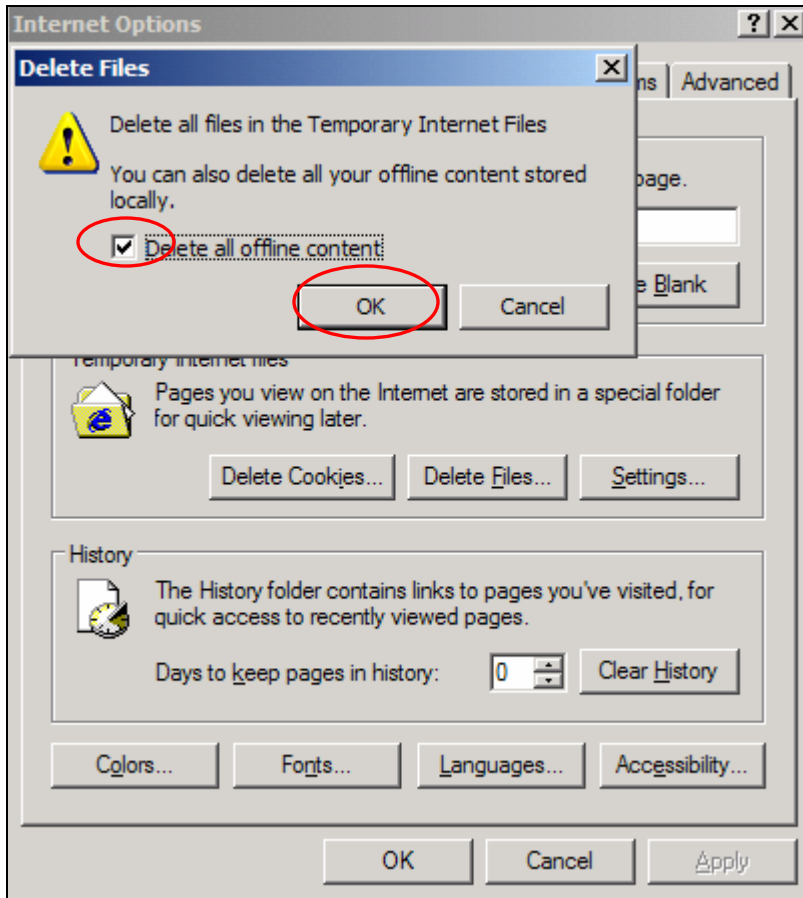
Other Portal Issues

1. If you have forgotten your password, you can reset it here
2. Update e-mail, name, security information for your Account
3. Page not found
4. Running a "pop-up blocker"
5. Windows XP Service Pack 2
6. Hosts file does not have write permissions
7. Manually starting the SAM
8. Manually disabling SAM
9. Proxy bypass for local addresses
10. Saving PowerPoint Files

Contact partnerinfo@ptc.com

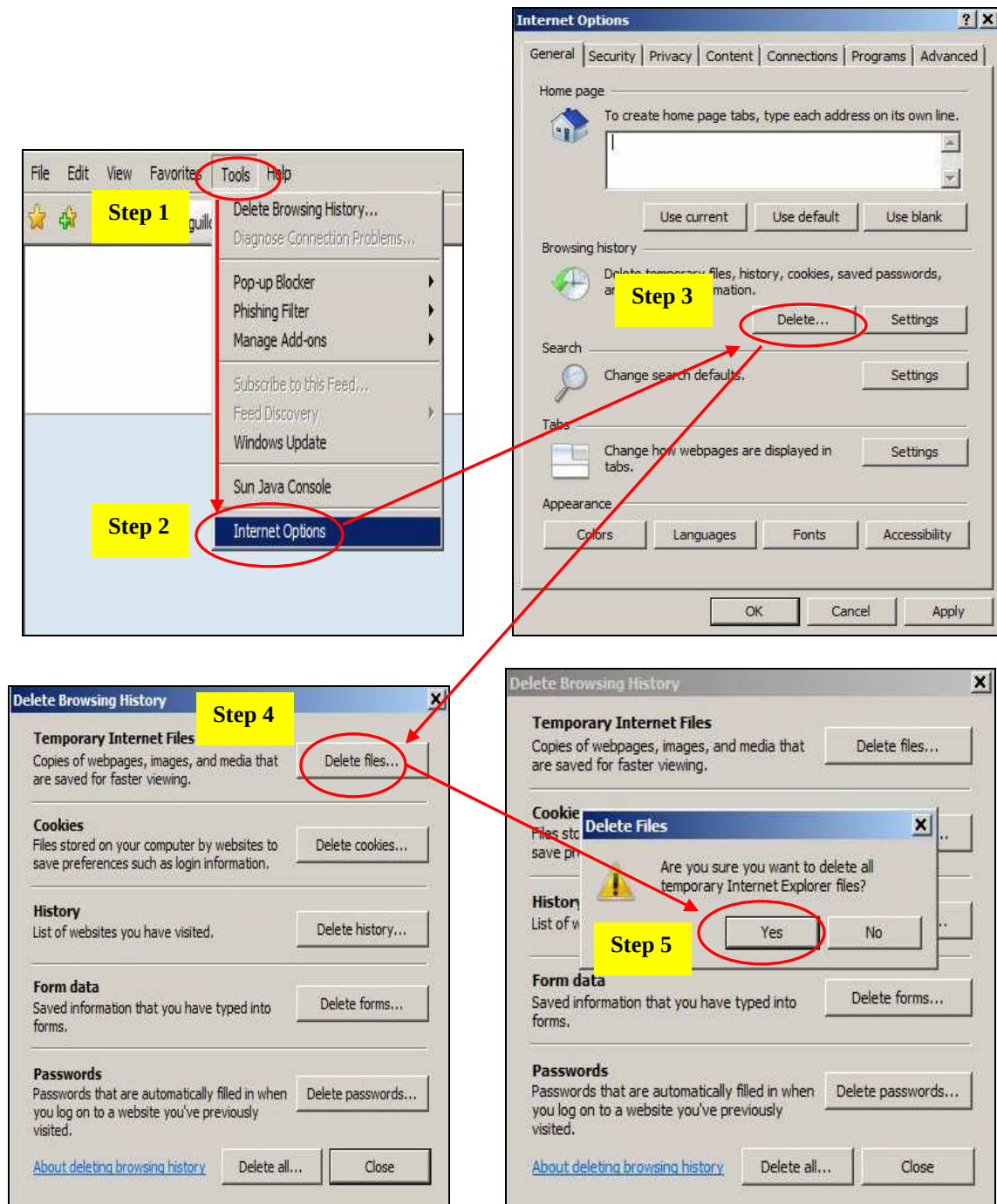
Diagnostics: Deleting the Browser Cache in IE6

1. Click **Tools**, then **Internet Options...**, then **Delete Files...**
2. Check **Delete all offline content**, then click **OK**.
3. Restart your browser.



Diagnostics: Deleting the Browser Cache in IE7

1. Click **Tools**, then **Internet Options**, then **Delete...**, then **Delete Files...**
2. Click **Yes**.
3. Restart your browser.



Diagnostics: Deleting the Browser Cache in Mozilla Firefox 2.X

1. Click **Tools**, then **Options...**
2. Click the **Network Tab**.
3. Click **Clear Now**.
4. Restart your browser.

